



Daniel M. Zugell, CLU, ChFC, LUTCF
Senior Vice President, Business Transition Advisors, Inc.



Dan is Senior Vice President of the national consulting firm, Business Transition Advisors, Inc. (BTA) and oversees the Central U.S division. BTA is a nationally recognized firm dedicated to assisting owners of closely held businesses with their business succession and liquidity planning with nationally recognized expertise in the education, design and implementation of Employee Stock Ownership Plans (ESOPs).

Dan joined BTA with experiences spanning many financial service disciplines including investments, insurance, financial planning, executive benefits and numerous ESOP related specialties at MetLife Group's Institutional division and other major financial companies and has risen to a nationally recognized thought leader, speaker and author throughout the country. Dan has also authored and featured in numerous national financial publications including the *Journal of Financial Service Professionals*, *Wealth Counsel Magazine*, TD Ameritrade's *Institutional Advisor Solutions* and *Employee Benefit Advisor* magazines.

Dan holds a B.A. from Grove City College and has earned several advanced financial designations from The American College. Dan is Past President of the Society of Financial Service Professionals-Pittsburgh, Past-Chair of the Pittsburgh Business Ethics Awards, Member: National Association of Estate Planners, The ESOP Association, The National Center for Employee Ownership, Ambassador/Strategic Planner for the Pennsylvania Center for Employee Ownership and Northway Christian Community Church.